A2500-2

Paper Paperboard & Wood Pulp

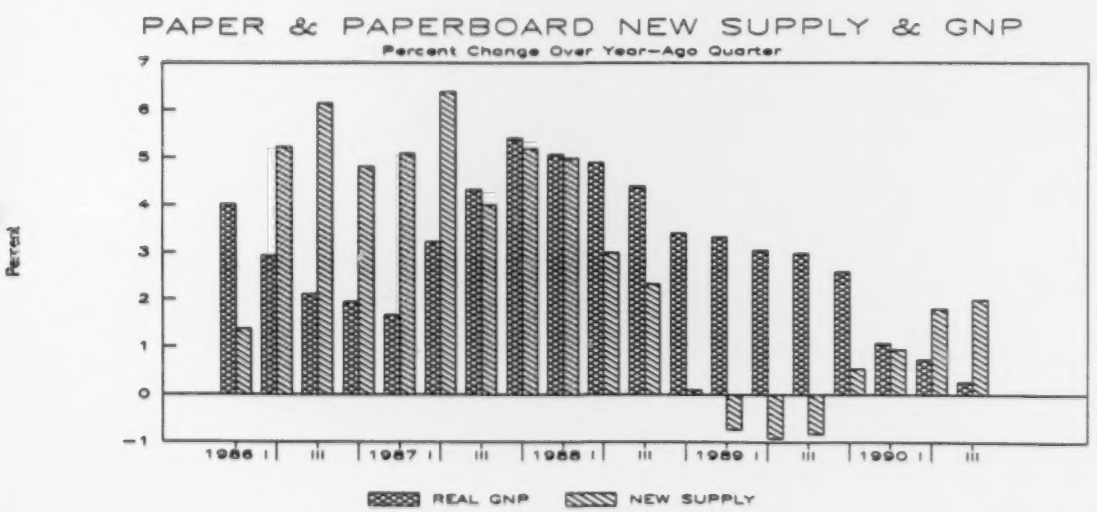
MONTHLY STATISTICAL SUMMARY - Vol.68 No.11 NOVEMBER 1990

PAPER AND PAPERBOARD PRODUCTION: STRENGTHENING

The seasonally adjusted rate of paper and paperboard production in October 1990 moved to a new high, slightly above the July peak. The July-October 1990 production rate was about 1.7% above that of the first half of 1990, bringing the January-October 1990 average to 78.3 million tons per year, 2.1% above its corresponding 1989 level.

This strength, coming at a time of slowdown in the growth of total economic activity, was consistent with the production trends in the major markets for paper and paperboard. The demand indicators in the accompanying Data Sheet show that the index of paper demand was 2.3% above its year-ago rate in the first ten months of 1990, paperboard demand 1.0%.

The chart below shows how total new supply of paper and paperboard (production plus imports less exports) has changed from year-ago levels compared with GNP. Last year real GNP grew faster than paper and paperboard new supply; this year the opposite is true. New supply appears to be moving back to its long-term relationship to real GNP.



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The current stability in paper and paperboard production also reflects, in part, the way the paper industry and users of paper and paperboard products have been managing their inventories. These inventories are at relatively low levels, whether measured in absolute volume or in terms of inventory/sales ratios. As a result, current output flows directly to consumption.

Paper production continues to strengthen. The October 1990 total of 3,468,800 tons marked a new monthly high. After adjustment for seasonal and workday factors, the rate -- 40.1 million tons per year -- was only fractionally below the July 1990 high. Similarly, printing-writing paper shipments moved above 2 million tons in October, marking the first time that level was breached.

Newsprint production, supported by the introduction of four new mills during the past 18 months or so, continues to dominate the grade-by-grade gains. At 6.6 million tons per year, the January-October 1990 output rate was 8.6% ahead of its corresponding 1989 total, with shipments up by more than 9%.

The two million tons of printing-writing papers shipped in October 1990 brought the ten-month 1990 total close to 22.5 million tons per year, 3.5% above its year-ago level. Shipments of uncoated groundwood papers, which had been lagging year-earlier rates, showed a particularly strong gain in October, bringing the year-to-date total back to its 1989 rate.

Coated paper shipments are moving at record-high rates, with the year-to-date total 5% higher than in 1989, with the free sheet grades up 5.3%, the groundwood grades 4.7%.

Gains in uncoated free sheet papers were spread pretty well across the entire spectrum. Shipments of form bond papers, however, are running slightly below their 1989 figures, largely reflecting the growth of personal computers, which utilize cut-size papers rather than the form bond used on the larger computers.

Tissue paper production is moving along a slow and steady growth trend. Its ten-month 1990 total is 2.6% ahead of its 1989 rate, following a 2.9% increase from 1988 to 1989.

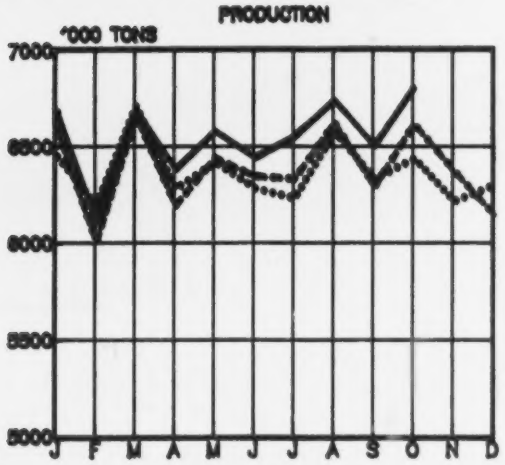
Shipments of unbleached kraft papers were down 9.8% in the January-October 1990 period. Use of these papers, however, virtually matched their year-ago totals. The 1989-1990 decline is shipments from domestic mills amounted to 216,000 tons. This was offset by an estimated 30,000-ton increase in net imports, the introduction of 128,000 tons of bag papers made from recycled fibers and a 55,000-ton swing in inventories at converting plants. A similar calculation for unbleached grocers bags & sacks transformed a 9.8% decline in shipments to a small gain in actual consumption.

PAPER AND PAPERBOARD STATISTICS PRODUCTION, SHIPMENTS AND ORDERS (Thousands of Tons)	YEAR 1988	YEAR 1989	JULY 1990	AUGUST 1990	SEPT (R) 1990	OCT (P) 1990	Annual Rate Y-T-D 1990	% Change From Same Period Last Year
PAPER								
Newsprint – Production	5,982	6,088	560	572	549	563	6,569	8.6
– Shipments	5,969	6,079	559	571	561	557	6,585	9.3
Printing & Writing: Total Shipments	21,860	21,607	1,857	1,972	1,826	2,002	22,485	3.5
Groundwood Paper – Shipments	1,624	1,743	152	147	137	168	1,763	0.0
– New Orders	1,654	1,741	156	164	166	163	1,835	4.2
– Unfilled Orders	208	193	175	197	220	203	203	11.2
Coated Groundwood – Shipments	4,204	4,059	355	375	356	387	4,216	4.7
Coated Free Sheet – Shipments	3,155	3,157	279	303	275	302	3,356	5.3
Total Coated Papers – Shipments	7,359	7,215	634	678	631	689	7,572	5.0
– New Orders	7,412	7,171	639	680	603	671	7,570	4.4
– Unfilled Orders	751	706	721	732	689	688	688	-9.8
Unctd Free Sheet – Shipments	11,277	11,081	947	1,011	928	1,010	11,568	3.8
– New Orders	11,298	11,097	899	1,019	943	996	11,710	5.8
– Unfilled Orders	790	748	800	832	826	832	832	29.2
Thin Papers – Shipments	281	245	18	19	16	19	225	-10.4
Cotton Fiber Paper – Shipments	169	161	12	14	13	14	164	0.4
Bleached Bristols – Shipments	1,150	1,163	95	104	101	103	1,192	0.5
Tissue Paper – Production	5,476	5,636	482	501	487	489	5,788	2.6
Total Packaging & Other Paper	5,033	4,916	381	394	384	415	4,649	-5.2
Unbl. Kraft Paper – Shipments	2,800	2,681	208	198	198	208	2,409	-9.8
Other Paper – Production	2,233	2,235	173	197	186	206	2,239	0.2
TOTAL PAPER PRODUCTION – UNADJUSTED	38,352	38,248	3,279	3,439	3,246	3,469	39,490	3.1
TOTAL PAPER PRODUCTION – SEAS ADJ			3,365	3,332	3,256	3,345	39,425	3.1
PAPERBOARD – PRODUCTION								
Containerboard	26,225	26,428	2,331	2,301	2,265	2,342	27,133	2.2
Cont'bd For Dom Use for Fibre Boxes	23,563	23,752	2,082	2,035	2,064	2,126	24,211	1.4
Total Linerboard	16,177	16,399	1,448	1,425	1,454	1,499	16,789	1.6
Unbleached Kraft	15,601	15,833	1,411	1,376	1,419	1,455	16,334	2.5
Solid Bleached	170	178	10	12	12	12	134	-27.5
Recycled	407	388	27	37	23	32	321	-19.8
Corrugating Medium	7,351	7,339	633	610	609	626	7,414	0.9
Semichemical	5,528	5,554	477	468	447	469	5,541	-0.5
Recycled	1,823	1,785	156	141	163	157	1,873	5.4
Container Chip and Filler	35	14	1	0	0	1	8	-46.6
Other Containerboard for Dom Use	320	307	27	22	23	25	290	-7.3
Containerboard for Export	2,342	2,369	222	245	179	191	2,633	11.9
Boxboard	11,878	12,029	946	1,004	993	999	11,988	-1.3
Boxboard for Packaging for Dom Use	7,014	7,076	560	579	585	578	6,992	-2.3
Folding Boxboard	5,293	5,370	415	428	440	448	5,223	-3.9
Solid Bleached	2,017	1,980	151	143	152	142	1,834	-7.9
Unbleached Kraft	924	987	77	76	81	84	945	-7.1
Recycled	2,353	2,403	187	209	207	221	2,444	0.8
Set-up Boxboard for Dom Use	279	288	20	27	24	23	306	3.8
Milk Carton & Food Service Dom Use	1,442	1,419	125	125	121	108	1,463	2.6
Other Boxboard for Domestic Use	4,075	4,089	321	341	334	344	4,046	-2.3
Boxboard for Export	789	863	65	84	74	77	950	12.3
Paperboard Production by Furnish	38,103	39,456	3,277	3,305	3,258	3,341	39,121	1.1
Unbleached Kraft	19,140	19,490	1,736	1,722	1,701	1,754	20,212	3.0
Semichemical	5,664	5,691	489	478	455	480	5,688	-0.3
Solid Bleached Kraft	4,511	4,521	355	362	363	343	4,407	-2.5
Recycled	8,788	8,754	697	743	739	764	8,815	-0.4
Paperboard Production for Export	3,132	3,232	287	329	253	268	3,583	12.0
Unbleached Kraft	2,296	2,363	222	249	178	189	2,644	12.6
Semichemical	136	138	12	9	9	12	147	4.9
Bleached Kraft	628	693	49	65	59	63	738	9.1
Recycled	72	38	4	6	7	4	55	52.7
TOTAL PAPERBOARD PRODUCTION – UNADJ	38,103	38,456	3,277	3,305	3,258	3,341	39,121	1.1
TOTAL PAPERBOARD PROD – SEAS ADJ			3,261	3,179	3,339	3,301	38,887	1.1
PAPER AND PAPERBOARD – UNADJ	76,455	76,704	6,556	6,744	6,504	6,810	78,611	2.1
PAPER AND PAPERBOARD – SEAS ADJ			6,626	6,511	6,595	6,647	78,312	2.1

R – Revised P – Preliminary Seas. Adj. – Seasonally Adjusted Unadj – Not Seasonally Adjusted

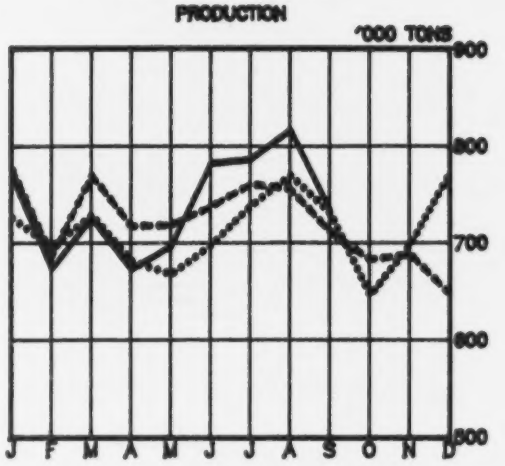
TOTAL PAPER AND PAPERBOARD

PRODUCTION



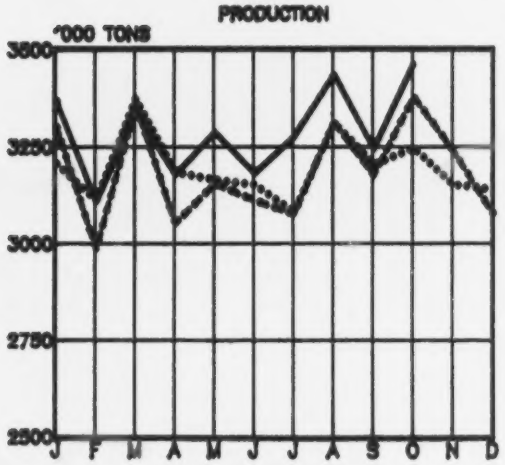
MARKET WOOD PULP

PRODUCTION



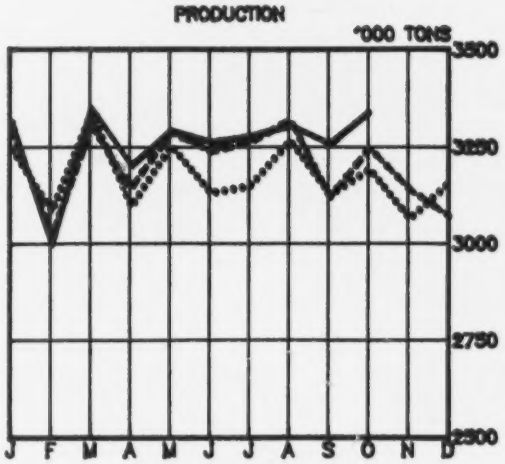
TOTAL PAPER

PRODUCTION



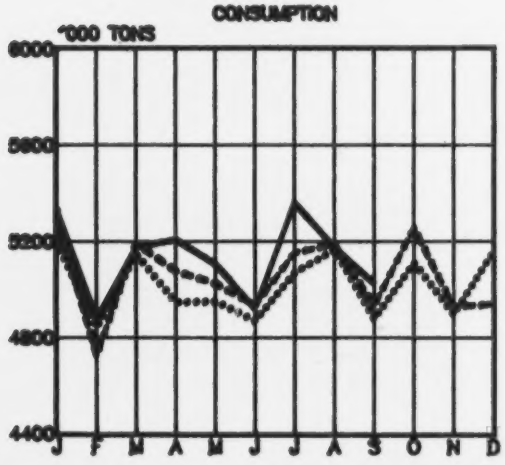
TOTAL PAPERBOARD

PRODUCTION



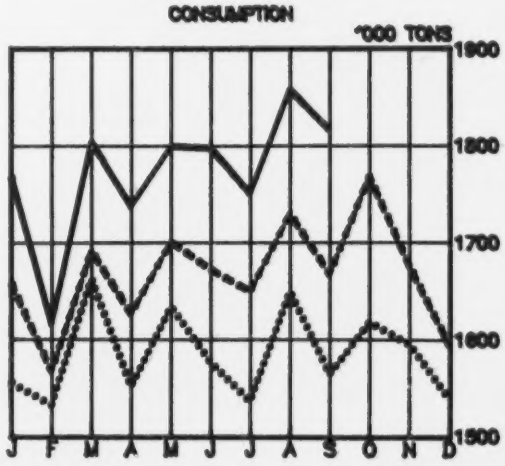
TOTAL WOOD PULP

CONSUMPTION



TOTAL WASTE PAPER

CONSUMPTION



1988 ..... 1989 - - - - - 1990 ———

WOOD PULP STATISTICS (Thousands of Tons)			YEAR 1988	YEAR 1989	JUNE 1990	JULY 1990	AUG (R) 1990	SEPT (P) 1990	Annual Rate Y-T-D 1990	% Change From Same Period Last Year
TOTAL WOOD PULP										
Total Wood Pulp	Production		61,161	61,998	5,175	5,490	5,366	5,200	63,129	1.4
	Imports	A	5,038	5,005	364	470	416	367	4,972	-1.3
	Exports		5,528	6,231	560	471	554	526	6,000	-6.2
	New Supply		60,671	60,772	4,978	5,489	5,229	5,042	62,147	2.1
Dissolving Pulp	Production		1,367	1,425	114	107	125	126	1,344	-5.5
	Imports		248	284	10	20	8	18	212	-27.3
	Exports		865	836	86	56	66	77	801	-4.1
	New Supply		751	873	38	71	67	66	754	-14.1
Paper Grades	Production		49,493	50,181	4,202	4,457	4,374	4,190	51,124	1.2
Chemical Pulp	Imports	A	4,419	4,370	328	421	373	318	4,390	-0.5
	Exports		4,612	5,325	469	412	485	446	5,152	-6.0
	New Supply		49,300	49,226	4,060	4,466	4,261	4,062	50,362	1.9
Groundwood and	Production		5,943	6,029	519	555	541	536	6,370	6.9
Thermo-Mech	Imports	A	371	351	26	29	35	31	371	11.9
	Exports		51	70	5	3	3	3	47	-41.1
	New Supply		6,263	6,309	540	581	573	564	6,694	7.7
Semi-Chemical	Production		4,358	4,363	341	371	327	349	4,291	-1.8
	Imports									
	Exports									
	New Supply		4,358	4,363	341	371	327	349	4,291	-1.8
MARKET WOOD PULP										
Total Market	Production		8,565	8,664	784	788	818	735	8,908	0.6
Wood Pulp	Imports		3,557	3,539	262	284	258	238	3,235	-9.2
	Exports		5,071	5,309	564	451	521	528	5,598	2.5
	New Supply		7,051	6,893	482	620	555	445	6,545	-6.0
Dissolving Pulp	Production		1,365	1,422	113	107	128	125	1,347	-5.0
	Imports		206	210	7	16	5	7	146	-32.1
	Exports		798	821	90	61	57	80	797	-3.2
	New Supply		774	810	31	62	76	52	696	-14.1
Paper Grades	Production		7,200	7,242	669	680	688	608	7,552	1.5
Chemical Pulp	Imports		3,126	3,072	231	245	230	212	2,842	-7.9
	Exports		4,273	4,489	474	390	464	449	4,801	3.5
	New Supply		6,052	5,825	426	534	454	371	5,593	-5.0
Groundwood Pulp	Production		0	(0)	2	2	2	2	9	N.M.
and All Other	Imports	RS	231	258	23	23	23	20	247	-6.3
	Exports		0	(0)	0	(0)	0	0	0	0.0
	New Supply		231	258	24	24	25	21	256	-3.0

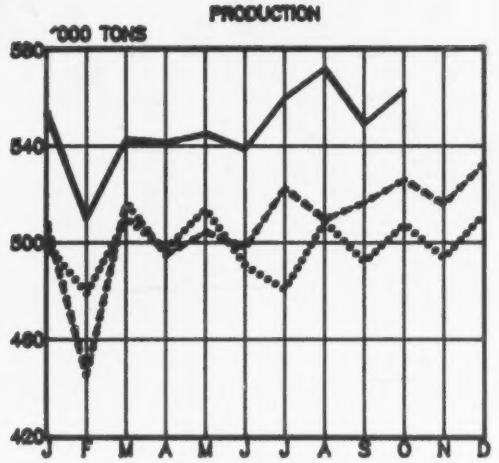
SOURCES: Total Wood Pulp Production & Market Wood Pulp Production, Imports & Exports – Pulp Division, Pulp, Materials and Technology Group, API. Total Wood Pulp Imports & Exports – Department of Commerce.
NOTE: A – API shifted Import data from January 1989 to December 1988 to compensate for misallocation of reported data. RS – Revised Series.

FIBROUS RAW MATERIALS (Thousands of tons)	YEAR 1988	YEAR 1989	JUNE 1990	JULY 1990	AUG (R) 1990	SEPT (P) 1990	Annual Rate 1990	% Change From Same Period Last Year
CONSUMPTION AT PAPER & PAPERBOARD MILLS								
Total	79,315	80,737	6,723	7,118	7,037	6,851	82,904	2.7
Total Wood Pulp	60,294	60,727	4,925	5,366	5,178	5,034	61,631	1.4
Waste Paper	19,021	20,010	1,798	1,752	1,859	1,817	21,273	6.6
INVENTORIES								
Chemical Paper Grade Market Pulp								
Producers' Own-Use Inventories	172	193	214	209	218	228	228	11.1
Producers' Market Inventories	261	342	438	526	527	461	461	26.5
Consumers' Purchased Inventories #	622	519	485	432	418	423	423	-28.2
Waste Paper at Paper & Bd. Mills	1,044	1,085	1,031	1,044	1,060	975	975	-9.1
Days of Supply at Pulp Mills of								
Chemical Paper Grade Mkt Pulp	14	19	21	25	24	22	22	15.8

SOURCES: Wood Pulp Data, Pulp Division, Pulp, Materials and Technology Group, API. Waste Paper Data, Paper Recycling Committee, API.
Includes all grades of wood pulp N.M. – Not Meaningful
P – Preliminary; R – Revised; (0) – Indicates zero to five-hundred short tons

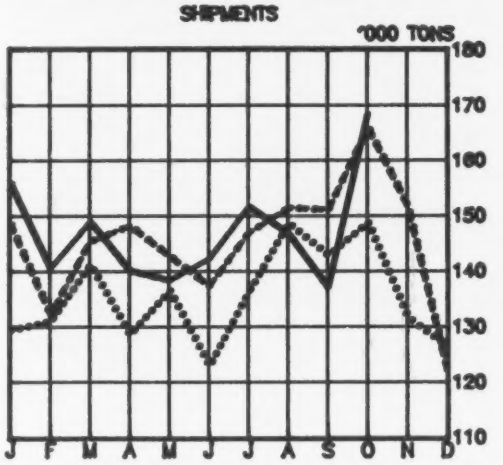
NEWSPRINT

PRODUCTION



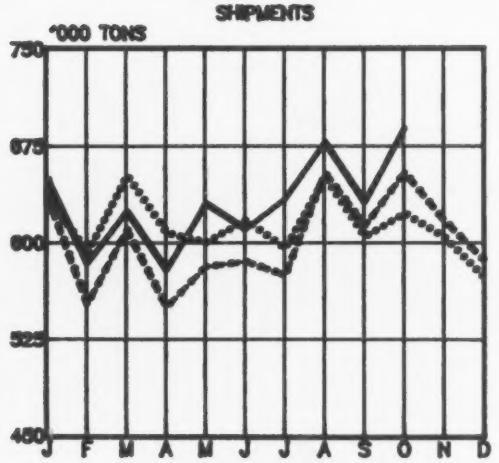
GROUNDWOOD PAPER, UNCOATED

SHIPMENTS



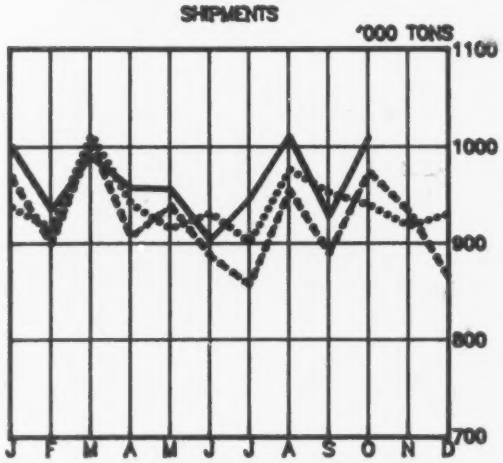
COATED PAPER

SHIPMENTS



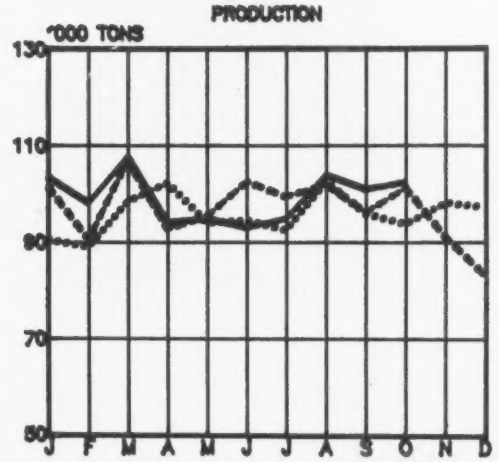
UNCOATED FREE SHEET PAPERS

SHIPMENTS



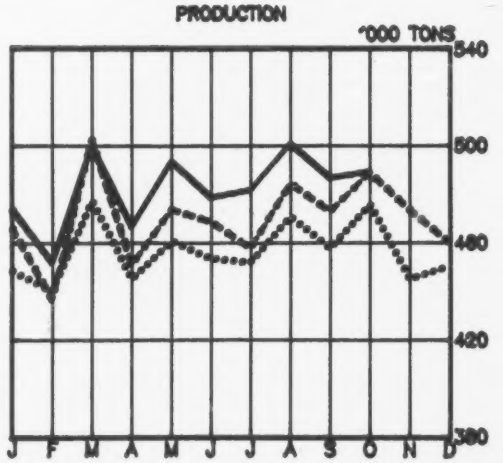
BLEACHED BRISTOLS

PRODUCTION



TISSUE PAPER

PRODUCTION



1988 ..... 1989 ----- 1990 ———

FIBROUS RAW MATERIALS (Thousands of Standard (128 Cu. ft.) Cord	YEAR 1988	YEAR 1989	JUNE 1990	JULY 1990	AUGUST 1990	SEPTEMBER 1990	ANNUAL RATE Y-T-D 1990	% CHANGE FROM SAME PD LAST YEAR
PULPWOOD								
Total U.S. – Total Receipts	96,537	99,279	8,006	8,395	8,452	8,271	99,323	0.2
– Total Consumpt	95,497	98,414	8,042	8,467	8,333	8,243	99,280	0.5
– Residues *	33,186	34,539	2,888	2,992	2,990	3,037	35,796	4.1
– Inventories	4,886	5,462	5,167	5,106	5,239	5,651	5,651	15.5
So. Atlantic – Total Receipts	31,582	31,982	2,644	2,696	2,651	2,838	32,795	2.1
– Total Consumpt	31,567	32,239	2,663	2,726	2,678	2,828	32,653	0.4
– Residues *	9,897	9,961	903	956	926	1,032	11,259	13.4
– Inventories	1,200	936	1,082	1,089	1,095	1,219	1,219	27.5
Northeast – Total Receipts	7,187	7,242	601	628	620	594	7,206	0.1
– Total Consumpt	7,216	7,072	603	614	590	565	7,191	0.5
– Residues *	1,664	1,575	129	117	132	121	1,497	-7.7
– Inventories	572	522	378	371	382	401	401	-9.7
South Central – Total Receipts	33,751	35,840	2,933	3,179	3,276	3,055	36,869	3.7
– Total Consumpt	33,646	35,791	2,908	3,193	3,149	3,096	36,569	2.2
– Residues *	9,890	10,539	931	962	1,002	938	11,497	11.1
– Inventories	1,160	1,336	1,192	1,226	1,348	1,307	1,307	23.9
North Central – Total Receipts	6,866	7,020	602	598	623	543	7,039	0.6
– Total Consumpt	6,929	6,963	579	590	602	515	7,049	1.5
– Residues *	1,334	1,422	105	106	122	100	1,320	-3.5
– Inventories	839	938	877	889	960	1,012	1,012	12.6
West – Total Receipts	16,152	17,196	1,226	1,294	1,282	1,241	15,412	-10.7
– Total Consumpt	16,139	16,349	1,289	1,344	1,314	1,240	15,817	-3.5
– Residues *	10,401	11,042	820	851	808	846	10,223	-8.2
– Inventories	1,117	1,730	1,638	1,531	1,454	1,712	1,712	11.4

* – Consumption of Residues in cords equivalent

SOURCE: American Pulpwood Association

UNITED STATES TRADE WITH CANADA		IMPORTS FROM CANADA * YEAR 1989 Tons	($000)	AUGUST 1990 Tons	($000)	SEPTEMBER 1990 Tons	($000)	ANNUAL RATE Y-T-D 1990 Tons	% CHANGE FROM SAME PD LAST YEAR
Pulpwood, Roundwood (in cubic meters)		211,061	4,582	0	0	0	0	0	-100.0
Pulpwood chips		792,186	27,339	54,546	1,869	64,366	2,170	714,879	-17.0
Wood Pulp, Total	A	4,353,343	2,599,247	363,807	214,769	332,080	189,796	4,422,045	1.2
Waste Fibrous Materials, Total		184,217	31,659	9,778	2,229	9,414	2,310	136,409	-20.2
Paper, Board & Products, Total	A	10,986,831	6,104,181	942,678	544,874	840,441	491,183	11,269,247	3.3
Paper, Paperboard,Wet Machine Bd. & Constr. Paper & Bd.	A	10,807,859	5,782,419	930,889	514,141	829,008	461,007	11,120,900	3.8
Paper, Paperboard & Products	A	10,830,545	6,065,486	928,757	541,062	825,496	487,573	11,142,083	3.7
Paper & Paperboard, Only	A	10,651,373	5,743,703	916,967	510,320	814,082	457,417	10,993,736	4.1
Paper, Total	A	10,234,258	5,579,018	867,940	490,598	786,680	438,490	10,481,089	3.4
Newsprint	A	6,330,674	4,278,705	671,002	353,438	578,592	306,399	8,238,267	-0.5
Printing, Writing & Rel. Pap.	A	1,579,698	1,069,263	164,307	113,158	155,665	108,022	1,886,246	21.8
Pack. & Ind. Conv. Paper		217,159	119,140	20,773	11,324	20,857	11,779	217,205	2.7
Special Industrial Paper		49,045	60,344	4,171	5,714	3,728	5,708	58,869	31.5
Tissue Paper		57,481	51,567	7,688	6,964	6,838	6,282	80,502	45.2
Paperboard, Total		417,117	164,685	49,027	19,721	48,383	18,927	512,647	22.2
Convtd Paper&Paperbd Products		179,172	321,762	11,789	30,732	11,434	30,158	148,348	-23.2
Wet Machine Board		293	245	112	93	101	93	1,000	265.6
Construction Paper & Board		155,993	38,472	13,809	3,729	14,844	3,497	126,164	-21.8

NOTE: A – API shifted Import data from January 1989 to December 1988 to compensate for misallocation of reported data.

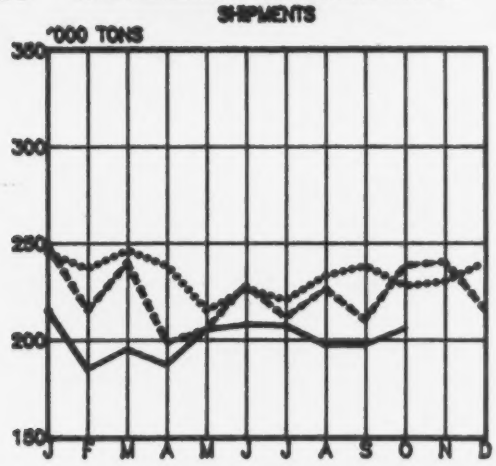
NOTE: 1990 EXPORT DATA NOT FULLY COMPARABLE WITH 1989'S.

	EXPORTS TO CANADA *							
Pulpwood, Roundwood (in cubic meters)	62,892	1,120	130,102	3,244	156,505	4,088	870,375	994.0
Pulpwood chips	28,218	1,241	15,114	747	27,348	1,139	192,159	480.9
Wood Pulp, Total	362,896	141,272	26,946	14,155	18,187	10,009	353,943	-1.1
Cotton Pulp & Other Pulp	6,215	4,249	238	214	349	310	4,488	-26.4
Waste Paper	284,379	38,555	66,175	11,386	48,573	8,820	864,549	119.2
Paper, Board & Products, Total	1,083,228	783,613	105,696	118,937	96,755	106,421	1,196,053	13.3
Paper, Paperboard,Wet Machine Bd. & Constr. Paper & Bd.	754,575	497,470	77,613	72,542	72,290	66,685	896,745	22.7
Paper, Paperboard & Products	1,062,560	755,810	105,480	118,789	96,518	106,158	1,196,784	15.4
Paper & Paperboard, Only	733,907	489,668	77,397	72,395	72,053	66,423	893,476	26.1
Paper, Total	371,208	340,312	44,711	62,521	43,286	49,091	516,548	44.4
Newsprint	8,316	5,891	1,724	992	1,532	845	18,893	111.9
Printing, Writing & Rel. Pap.	228,021	222,055	31,178	36,513	30,782	34,438	374,399	70.7
Pack. & Ind. Conv. Paper	65,390	29,624	4,495	3,106	4,851	3,266	50,577	-12.2
Special Industrial Paper	62,645	72,955	6,015	10,468	4,860	9,071	59,034	-8.6
Tissue Paper	6,834	9,787	1,300	1,442	1,259	1,471	13,645	87.3
Paperboard, Total	362,701	149,366	32,667	19,874	28,769	17,331	378,928	7.4
Convtd Paper&Paperbd Products	328,653	286,143	28,082	46,394	24,465	39,735	302,308	-7.7
Wet Machine Board	1,626	660	0	0	0	0	0	-100.0
Construction Paper & Board	19,040	7,143	216	148	237	263	2,269	-68.2

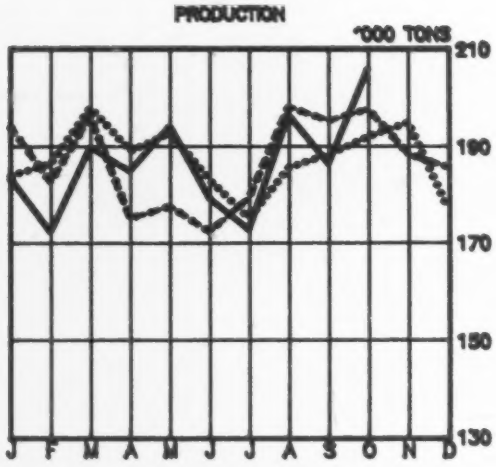
SOURCE: Bureau of Census, Department of Commerce .

E – Estimate of tonnage based on square foot data

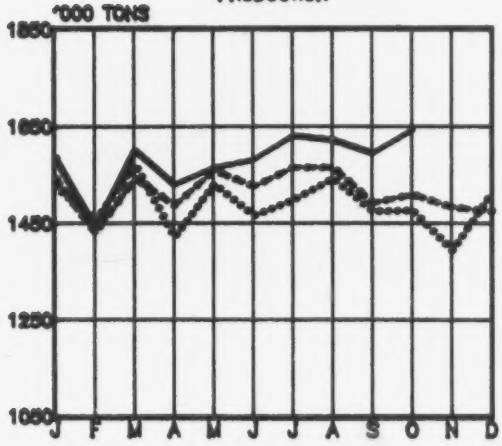
UNBLEACHED KRAFT PACKAGING AND INDUSTRIAL CONVERTING PAPER SHIPMENTS



OTHER PAPER PRODUCTION

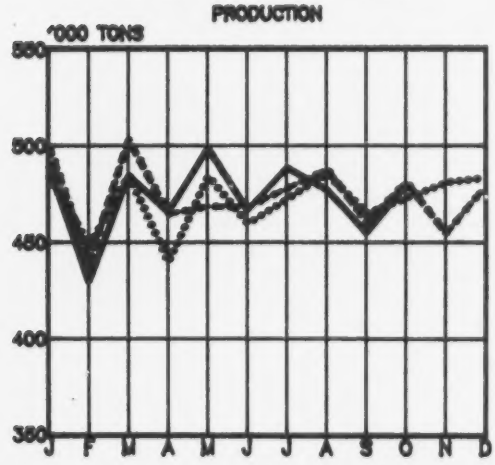


UNBLEACHED KRAFT LINERBOARD PRODUCTION

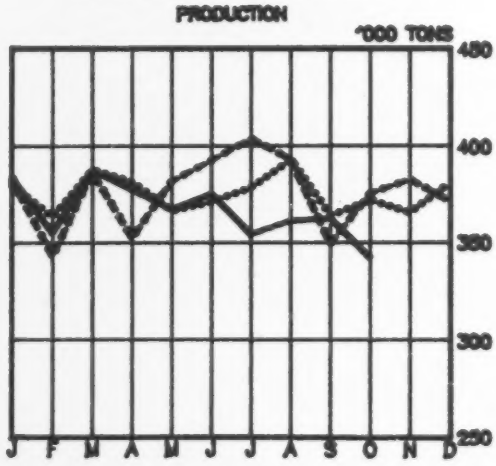


RECYCLED PAPERBOARD PRODUCTION

SEMICHEMICAL PAPERBOARD PRODUCTION



SOLID BLEACHED PAPERBOARD PRODUCTION



1988 ••••••• 1989 -·-·-·-1990 ———

PULP, PAPER AND PAPERBOARD IMPORTS		YEAR 1989		AUGUST 1990		SEPTEMBER 1990		Annual Rate YTD 1990	% Change from same Period
		Tons	$000	Tons	$000	Tons	$000	Tons (1)	Last Year
Pulpwood Roundwood (cubic meters)		211,061	4,582	0	0	0	0	0	-100.0
Pulpwood Chips		805,381	27,759	55,004	1,888	64,394	2,188	716,179	-18.5
Total All Imports	A	18,288,860	11,352,263	1,531,270	961,257	1,381,405	871,256	18,322,743	0.2
Wood Pulp Total	A	5,005,100	2,980,842	416,322	240,691	367,313	209,489	4,972,309	-1.3
Waste Paper		172,575	33,197	9,569	2,156	8,930	2,015	128,217	-29.7
Other Fibrous Materials		11,254	8,518	644	389	908	489	13,730	4.5
Paper Board & Products Total	A	13,099,931	8,329,906	1,104,736	718,020	1,004,354	659,264	13,206,488	1.2
Paper Paperboard Wet Machine Bd. & Construction Paper & Board	A	12,537,474	7,231,648	1,070,766	633,061	966,664	579,017	12,786,432	2.7
Paper Ppbd & Prds ex Cnst&WMB	A	12,910,206	8,279,503	1,089,336	713,190	987,653	664,514	13,066,157	1.7
Paper & Paperboard Only	A	12,347,748	7,181,244	1,055,369	628,231	951,963	574,268	12,644,102	3.2
Paper Total	A	11,814,283	6,900,798	997,754	600,271	896,958	540,188	12,035,793	2.5
Newsprint	A	8,553,401	4,379,613	684,450	359,333	548,270	310,509	8,427,157	-1.0
Printing & Writing	A	2,732,978	1,996,141	263,996	192,459	262,848	192,121	3,054,571	13.5
Uncoated Groundwood		1,304,114	817,785	112,180	72,371	107,896	69,873	1,304,185	0.4
Coated Print.& Impreg. Pap.	A	774,022	632,484	79,274	62,605	82,822	65,498	957,199	28.2
Uncoated Free Sheet	A	583,077	462,404	64,574	48,534	66,379	50,275	714,148	24.5
Thin (except Cigarette)		12,711	15,200	1,123	1,188	981	1,085	10,853	-10.0
Bristols		59,052	68,267	6,845	7,782	4,790	5,389	68,187	16.7
Total Pkg & Other Paper		407,087	414,353	37,251	37,639	36,509	38,030	432,901	11.3
Unbleached Kraft Paper		239,303	116,011	12,965	11,291	21,114	10,532	240,815	4.3
Other Pkg. & Indust. Paper		167,785	298,342	14,287	26,348	15,395	27,498	192,087	21.4
Tissue		120,797	110,891	12,057	10,839	9,382	8,527	121,164	2.4
Paperboard, Total		533,486	280,446	57,615	27,980	54,975	25,080	608,309	11.7
Test or Containerboard		85,048	34,401	9,042	4,079	9,342	4,217	123,686	45.4
Semi-Chemical Corrugating		118,178	36,462	8,797	2,400	9,753	2,517	107,400	-14.6
Other Paperboard		330,262	209,584	39,776	21,481	35,879	18,346	377,223	13.0
Convtd Paper&Paperbd Products		582,457	1,098,259	33,966	84,960	35,660	80,247	422,056	-28.9
Paper Products, Total		470,471	924,729	25,238	68,247	26,975	64,247	318,368	-36.1
Paperboard Products, Total		91,986	173,529	8,730	16,713	8,714	16,000	103,688	8.1
Wet machine Board		808	580	116	95	131	116	1,258	115.7
Construction Paper & Board E		189,119	49,824	15,283	4,735	16,570	4,634	141,074	-29.8
Notes									
Other: No Weight Avail. ($000)			136,824		14,519		10,411	132,255	-3.5
Total Imports Incl. Other($000)			11,488,886		975,775		881,668	11,511,241	0.4

NOTE: A – API shifted Import data from January 1989 to December 1989 to compensate for misallocation of reported data.

NOTE: 1990 EXPORT DATA NOT FULLY COMPARABLE WITH 1989'S.

PULP, PAPER AND PAPERBOARD EXPORTS	YEAR 1989		AUGUST 1990		SEPTEMBER 1990		Annual Rate YTD 1990	% Change from same Period
	Tons	$000	Tons	$000	Tons	$000	Tons (1)	Last Year
Pulpwood, Roundwood (cubic meters)	137,617	3,475	137,274	3,441	159,609	4,175	964,693	487.3
Pulpwood Chips	4,357,811	368,154	505,399	42,721	388,205	33,378	4,569,211	2.1
Total All Exports	18,633,605	8,603,945	1,743,734	806,318	1,685,755	788,161	19,506,549	2.8
Wood Pulp,Total	6,231,172	3,512,804	553,825	295,911	525,985	269,480	5,999,511	-8.2
Cotton Pulp and Other Pulp	122,045	100,510	8,985	8,728	15,343	11,301	138,781	17.9
Waste and Old Paper	5,980,620	729,797	579,173	82,001	494,534	58,351	6,411,448	4.7
Paper, Board & Products,Total	6,299,768	4,261,035	603,750	451,678	580,464	429,029	6,863,231	8.4
Paper,Paperboard,Wet Machine Bd. & Construction Paper & Board	5,259,733	2,982,686	511,810	303,334	497,198	298,496	5,830,906	10.8
Paper, Ppbd & Prod ex Cnst&WMB	5,263,491	4,246,277	602,961	451,296	579,507	428,265	6,854,028	8.8
Paper & Paperboard, Only	5,223,456	2,987,928	511,022	302,952	496,241	297,732	5,821,703	11.1
Paper, Total	1,465,752	1,233,527	136,442	131,449	141,336	131,463	1,515,361	0.7
Newsprint	624,798	357,381	47,121	26,922	59,799	34,263	534,248	-19.3
Printing & Writing	478,201	495,168	62,287	64,524	53,827	57,278	671,012	41.8
Uncoated Groundwood	88,056	64,766	5,935	4,963	7,817	5,498	74,931	-18.4
Clay Coated Paper	188,538	131,418	25,957	23,032	18,207	17,878	224,151	35.0
Uncoated Free Sheet	122,346	166,830	19,737	26,272	17,933	23,372	231,792	104.3
Other Printing & Writing	99,260	102,154	10,837	10,258	10,070	10,530	140,138	37.6
Total Pkg. & Other Paper	342,041	380,790	24,886	37,257	24,526	36,075	278,907	-19.4
Unbleached Kraft	125,818	60,316	9,370	5,075	8,600	5,033	110,202	-12.2
Other Pkg. & Indust. Paper	216,223	320,472	15,516	32,182	15,927	31,042	168,706	-23.5
Tissue	20,712	30,187	2,169	2,745	3,184	3,847	31,193	39.1
Paperboard, Total	3,757,704	1,734,402	374,579	171,503	354,905	166,269	4,306,342	15.3
Solid Wood Pulp	3,572,758	1,646,152	358,563	162,655	340,712	157,729	4,072,182	14.8
Total Linerboard	2,499,716	935,364	265,255	95,548	247,169	89,450	2,990,298	20.1
Bleached Kraft Linerboard	283,113	127,787	35,607	15,277	33,474	14,451	309,883	14.0
Unbleached Kraft Linerbd	2,216,603	807,578	229,647	80,270	213,695	74,999	2,681,415	20.9
Other Unbleached Kraft	246,575	113,315	23,011	13,012	16,628	9,595	260,873	8.0
Other Bleached Kraft	795,305	582,979	65,640	52,398	71,047	58,715	771,265	-1.8
Semi-Chemical Corrugating	31,162	14,494	4,658	1,697	5,869	1,970	49,745	60.2
Recycled Paperboard	184,947	88,250	16,016	8,848	14,192	8,540	234,161	25.6
Convtd Paper&Paperbd Products	1,040,036	1,278,349	91,939	148,344	83,266	130,533	1,032,325	-2.5
Paper Products, Total	473,435	832,809	40,299	92,468	36,879	87,314	428,934	-12.7
Paperboard Products, Total	566,601	445,543	51,640	55,876	46,387	43,219	603,391	6.3
Wet Machine Board	2,889	1,258	68	72	28	10	617	-82.0
Construction Paper & Board E	33,388	13,501	720	351	930	754	8,585	-74.0
Notes								
Other: No Weight Avail. ($000)		23,985		5,021		3,874	49,426	109.8
Total Exports Incl. Other($000)		8,627,911		811,339		770,034	9,231,880	5.1

SOURCE: Bureau of Census, U.S. Department of Commerce. E – Incl. estim. of tonnage based on square foot data.

(1) Annual Rate Year-To-Date is in tons unless otherwise specified in item description.

PRODUCER PRICE INDEXES 1982 = 100	YEAR 1988	YEAR 1989	JULY 1990	AUGUST 1990	SEPT 1990	OCTOBER 1990	Annual Rate Y-T-D 1990	% Change from same Period Last Year
Pulp, Paper and Products except Building Grades	124.8	132.4	132.6	132.8	132.6	132.9	133.0	0.6
Pulp Paper & Products, ex. Building Grades & ex. Waste Paper *	123.8	132.0	132.6	132.7	132.8	132.9	132.9	0.8
Total Wood Pulp	136.7	157.4	151.1	152.7	150.1	147.3	154.1	-1.8
Total Paper	123.2	129.6	129.1	128.8	129.8	130.2	128.6	-1.0
Writing Paper, exc. Newsprint	123.4	130.5	129.3	129.2	130.3	130.6	128.9	-1.5
Newsprint	127.6	122.5	121.6	121.9	121.8	122.0	118.9	-3.5
Total Paperboard	133.2	140.1	139.9	135.5	133.1	133.9	136.3	-2.7
Total Paper and Paperboard *	126.4	132.9	130.9	130.9	130.8	131.4	131.0	-1.6
Converted Products	123.0	131.7	134.9	135.1	135.2	135.7	135.0	3.0
Waste Paper	183.6	157.1	133.3	136.3	130.0	130.0	140.4	-11.2
All Commodities	106.9	112.2	114.3	114.3	118.3	120.8	115.4	2.9
Industrial Commodities	106.3	111.8	113.2	113.2	118.3	121.3	114.7	2.9

SOURCE: Producer Price Indexes: Bureau of Labor Statistics, U.S. Department of Labor * Computed by API

HOURLY COMPENSATION COSTS FOR PRODUCTION WORKERS IN NATIONAL CURRENCY
PAPER AND ALLIED PRODUCTS MANUFACTURING (US SIC 26)

1975 AND 1979-89

COUNTRY OR AREA	1975	1979	1980	1981	1982	1983	1984	1985	1986	1987	1988	1989
UNITED STATES	6.52	9.64	10.65	11.77	12.85	13.73	14.32	14.95	15.42	15.76	16.09	16.53
CANADA	7.35	11.27	12.30	14.26	15.90	17.43	18.21	19.18	20.12	20.78	21.61	22.49
BRAZIL	7	41	78	164	341	732	2154	7972				
ISRAEL	1.34	7.60	17.84	42.48	94.36	244.10	1139.49	4.03	6.78	9.03	11.29	12.80
JAPAN	985	1269	1324	1408	1526	1541	1640	1650	1619	1621	1751	1966
KOREA	206	689	731	845	966	1102	1137	1252	1402	1603	1971	2574
SINGAPORE	1.51	2.51	2.97	3.62	4.03	4.70	5.42	5.62	5.52	5.64	6.19	7.42
TAIWAN	17.69	35.72	44.05	51.38	62.41	62.97	72.60	71.38	76.10	81.25	89.91	101.83
AUSTRIA	81.60	112.90	119.78	129.71	137.21	146.37	153.78	162.42	169.13	180.09	194.79	202.89
BELGIUM	238.08	343.73	377.34	416.14	435.56	464.37	505.13	536.42	560.43	580.85	596.85	
DENMARK	37.29	58.93	66.60	73.59	81.14	88.16	92.76	95.68	98.99	110.24	119.78	124.24
FRANCE	21.48	36.12	41.84	47.49	54.78	61.83	66.79	70.79	76.33	79.93	83.11	87.10
GERMANY	13.91	19.19	20.72	21.96	23.17	23.82	24.82	25.60	26.35	28.09	29.35	30.16
GREECE	51	125	159	198	273	343	436	517	572	625	719	
IRELAND	1.40	2.60	3.14	3.90	4.36	4.88	5.41	5.73	6.23	6.45	6.88	7.24
ITALY	3439	6747	7653	8927	10571	12407	13766	15195	15925	17084	18186	19513
NETHERLANDS	18.12	24.53	25.02	25.64	27.01	27.74	29.01	31.52	33.51	34.35	34.89	
PORTUGAL	46.18	104.10	131.40	154.57	184.16	232.77	284.48	378.31	449.79			
SPAIN		378	494	525	626	699	813	897	981	1056	1106	
SWEDEN	31.93	53.87	58.79	65.94	69.82	75.30	85.94	94.30	101.75	110.17	117.82	130.27
SWITZERLAND	14.78	16.94	17.82	19.44	20.81	21.75	22.55	23.48	24.72	25.70	26.36	27.73
UNITED KINGDOM	1.53	2.80	3.34	3.67	4.17	4.48	4.81	5.17	5.55	5.95	6.45	6.84

SEE SEPARATE APPENDIX FOR DEFINITIONS, METHODS, DATA LIMITATIONS, CURRENCY EXCHANGE RATES, AND COUNTRY NOTES.

SOURCE: U.S. BUREAU OF LABOR STATISTICS, SEPTEMBER 1990.

The data on Other Packaging and Industrial Papers, which include bleached kraft and specialty packaging papers plus special industrial papers, have been revised downward by about 55,000 tons (annual rate). The new data indicate that production of these papers are matching their year-ago rates, with a gain in specialty packaging and bleached kraft papers offsetting declines in the special industrial grades.

Paperboard production has also notched upward since mid-1990, with the July-October seasonally adjusted rate 1.5% ahead of its first half 1990 average. The 10-month rate, 38.9 million tons per year, marked a 1.1% gain from the 1989 level.

The gains are concentrated in the containerboard grades. Total linerboard and corrugating medium production, for example, showed a 2.2% increase over 1989, with production for domestic use up 1.4% and production for export 11.9% higher than its year-ago total. The domestic shipments are consistent with the 1.7% increase in shipments of fibre boxes.

Among the boxboard grades, the recycled categories are generally outperforming paperboard made from solid wood pulp. Production of recycled folding boxboard in the first ten months of 1990, for example, increased 0.8%, compared to a 7.9% decline in solid bleached folding boxboard and a 7.1% drop in the unbleached kraft sector. Some recovery in production of unbleached kraft folding boxboard is evident, with the September and October 1990 totals ahead of their year-ago counterparts.

Production of the other bleached kraft paperboard grades, however, is relatively strong: production of milk carton and food service paperboard for domestic use was up 2.6% in the January-October 1990 period, while exports of bleached kraft paperboard gained 9.1%.

FIBROUS RAW MATERIAL

Waste paper continues to gain in importance as a paper-making fiber. In the January-September 1990 period waste paper consumption at paper and paperboard mills expanded by 6.6%, compared to a 1.4% increase in use of wood pulp. At the same time, total production of chemical paper grade wood pulp rose 1.2%; the mechanical pulp grades gained 6.9%, reflecting the increase in newsprint production.

Data for the first ten months of 1990 indicate that exports of chemical paper grade market pulp showed a 4.8% rise, while shipments to the domestic market were down 1.9%. The largest gain in exports was reflected in the 12% increase in shipments to the Asian/African countries. The tonnage gain -- 106,000 tons --was just about matched by the 6.9% increase in shipments to Western Europe. Shipments to the Asian/African countries accounted for 25% of the export total; those to Western Europe, 41%. Exports to Latin America showed a greater percentage gain -- 40% -- but the total accounted for only 9% of these exports.

INTERNATIONAL COMPARISONS OF HOURLY COMPENSATION IN THE PAPER AND ALLIED PRODUCTS INDUSTRY

The Bureau of Labor Statistics recently released its annual compilation of hourly compensation paid to paper and allied products industry production workers in 22 countries. Hourly compensation is defined as all payments made directly to the worker plus employer contributions to legally required insurance programs and private benefit plans. The data, which have been updated to include 1989, are reported both in national currencies and U.S. dollars.

The dollar values were calculated by converting hourly compensation costs in national currencies to U.S. dollars using prevailing exchange rates. The data indicate that several important European countries, including Germany and France, experienced a decline in dollar labor costs in 1989 due to a relative weakening of their currencies vis-à-vis the U.S. dollar. U.S. hourly compensation costs in the paper and allied products industry rose 2.7% in 1989, according to the Bureau of Labor Statistics.

Hourly compensation paid to production workers in the Canadian paper and allied products industry increased 4.1% in terms of Canadian currency but 8.2% in U.S. dollars last year. The larger increase in U.S. currency terms was due to a strengthening of the Canadian dollar.

In 1989, own-currency hourly compensation costs rose 12.3% in Japan, a major market for U.S. paper products, and 10.6% in Sweden, which is a major competitor. However, in terms of dollars, the increases were a more moderate 4.2% and 5.1%, respectively. The following table shows international comparisons of production worker hourly compensation measured in U.S. dollars.

HOURLY COMPENSATION COSTS FOR PRODUCTION WORKERS IN U.S. DOLLARS
PAPER AND ALLIED PRODUCTS MANUFACTURING (US SIC 26)

1975 AND 1979-89

COUNTRY OR AREA	1975	1979	1980	1981	1982	1983	1984	1985	1986	1987	1988	1989
UNITED STATES	6.52	9.64	10.65	11.77	12.85	13.73	14.32	14.95	15.42	15.76	16.09	16.53
CANADA	7.22	9.63	10.53	11.89	12.88	14.15	14.06	14.04	14.47	15.67	17.55	18.99
BRAZIL	.88	1.52	1.48	1.76	1.90	1.27	1.17	1.29				
ISRAEL	2.10	2.99	3.48	3.72	3.89	4.34	3.89	3.42	4.56	5.66	7.06	6.68
JAPAN	3.32	5.81	5.87	6.40	6.13	6.48	6.91	6.92	9.62	11.21	13.66	14.24
KOREA	.43	1.42	1.20	1.24	1.32	1.42	1.41	1.44	1.59	1.95	2.69	3.83
SINGAPORE	.64	1.15	1.39	1.72	1.89	2.22	2.54	2.55	2.53	2.68	3.08	3.81
TAIWAN	.47	.99	1.22	1.39	1.60	1.57	1.83	1.79	2.01	2.55	3.14	3.86
AUSTRIA	4.69	8.44	9.26	8.16	8.04	8.15	7.69	7.85	11.08	14.24	15.76	15.32
BELGIUM	6.49	11.72	12.92	11.24	9.51	9.08	8.75	9.04	12.55	15.55	16.23	
DENMARK	6.50	11.20	11.83	10.36	9.72	9.64	8.96	9.03	12.23	16.10	17.77	16.97
FRANCE	5.02	8.49	9.91	8.78	8.33	8.11	7.65	7.88	11.02	13.30	13.95	13.65
GERMANY	5.67	10.47	11.41	9.74	9.54	9.33	8.72	8.70	12.14	15.62	16.71	16.03
GREECE	1.59	3.38	3.72	3.57	4.08	3.90	3.87	3.74	4.09	4.61	5.06	
IRELAND	3.12	5.32	6.46	6.29	6.20	6.09	5.87	6.11	8.36	9.60	10.50	10.27
ITALY	5.27	8.12	8.95	7.89	7.81	8.17	7.84	7.96	10.68	13.17	13.97	14.22
NETHERLANDS	7.18	12.23	12.60	10.31	10.11	9.72	9.04	9.50	13.69	16.95	17.64	
PORTUGAL	1.81	2.13	2.63	2.52	2.30	2.09	1.93	2.20	3.00			
SPAIN		5.63	6.90	5.71	5.68	4.87	5.06	5.28	7.01	8.55	9.49	
SWEDEN	7.71	12.56	13.90	13.10	11.11	9.82	10.39	10.96	14.28	17.36	19.20	20.18
SWITZERLAND	5.73	10.19	10.64	9.92	10.24	10.35	9.59	9.56	13.75	17.23	18.01	16.94
UNITED KINGDOM	3.39	5.95	7.76	7.43	7.30	6.79	6.42	6.71	8.15	9.75	11.48	11.20

SEE SEPARATE APPENDIX FOR DEFINITIONS, METHODS, DATA LIMITATIONS, CURRENCY EXCHANGE RATES, AND COUNTRY NOTES.

SOURCE: U.S. BUREAU OF LABOR STATISTICS, SEPTEMBER 1990.

MONTHLY STATISTICAL SUMMARY INSERT
VOL. 68, NO. 11
NOVEMBER, 1990

PRODUCTION (000 TONS)

	(P) OCT 1990	(R) SEPT 1990	OCT 1989	FIRST 10 MONTHS 1990	FIRST 10 MONTHS 1989	% CHANGE YR TO DATE 1990/1989
PAPER GRADES						
Newsprint	563	549	526	5,474	5,040	8.6
Printing & Writing	2,002	1,826	1,930	18,737	18,098	3.5
Uncoated Groundwood (s)	168	137	166	1,469	1,469	0.0
Coated Groundwood (s)	387	356	362	3,514	3,356	4.7
Coated Free Sheet (s)	302	275	292	2,796	2,656	5.3
Total Coated Paper (s)	689	631	655	6,310	6,012	5.0
Uncoated Free Sheet Paper (s)	1,010	928	975	9,640	9,283	3.8
Thin Paper (s)	19	16	19	188	210	-10.4
Cotton Fiber Paper (s)	14	13	14	137	136	0.4
Bleached Bristols (s)	103	101	101	994	989	0.5
Tissue Paper	489	487	489	4,823	4,703	2.6
Total Pkg & Other Paper	415	384	436	3,874	4,087	-5.2
Unbl. Kraft Paper (s)	208	198	239	2,008	2,225	-9.8
Other Paper	206	186	197	1,866	1,862	0.2
TOTAL PAPER	3,469	3,246	3,380	32,909	31,928	3.1
PAPERBOARD GRADES						
Unbleached Kraft Paperboard	1,754	1,701	1,619	16,843	16,346	3.0
Unbleached Kraft Linerboard	1,644	1,597	1,512	15,815	15,239	3.8
Other Unbl. Kraft Paperboard	110	104	107	1,029	1,108	-7.1
Semichemical Paperboard	480	455	482	4,740	4,756	-0.3
Bleached Paperboard	343	363	376	3,673	3,766	-2.5
Recycled Paperboard	764	739	771	7,346	7,374	-0.4
TOTAL PAPERBOARD	3,341	3,258	3,248	32,601	32,243	1.1
TOTAL PAPER AND PAPERBOARD	6,810	6,504	6,628	65,510	64,171	2.1

WOOD PULP (ALL GRADES)	SEPT 1990	AUG 1990	SEPT 1989	FIRST 9 MONTHS 1990	FIRST 9 MONTHS 1989	% CHANGE YR TO DATE 1990/1989
Dissolving & Special Alpha	126	125	128	1,008	1,066	-5.5
Bleached Sulfite)	112	139	132	1,175	1,185	-0.9
Unbleached Sulfite)						
Bleached & Semi-Bl. Sulfate	2,226	2,392	2,166	20,632	20,407	1.1
Unbleached Sulfate	1,852	1,843	1,760	16,537	16,287	1.5
Semichemical	349	327	361	3,218	3,276	-1.8
Groundwood & Thermomechanical	536	541	505	4,778	4,471	6.9
TOTAL PULP DIVISION DATA	5,200	5,366	5,051	47,347	46,691	1.4

(s) - Shipments
P - Preliminary
R - Revised

AMERICAN PAPER INSTITUTE, INC.
260 Madison Avenue
New York, New York 10016

INDUSTRY DATA November 30, 1990	1988	1989	1990	1990 R	1990 P	AN RATE Y-T-D 90	% CH/ SAME PD 89
PAPER AND PAPERBOARD -- Tons (000)			AUGUST	SEPTEMBER	OCTOBER		
Total Production (API)....: excluding :	76,469	76,713	6,744	6,504	6,810	78,612	2.1
Total Seasonally Adjusted....: construction :			6,511	6,595	6,647	78,312	2.1
Imports (Including Products)....: and wet :....E	12,788	12,910	1,069	966	1,000	12,960	0.0
Exports (Including Products)....: machine :....E	5,559	6,264	603	580	600	6,560	6.5
Apparent Consumption....: grades :	83,697	83,359	6,997	7,003	7,047	84,662	1.6
Paper Production % Tonnage Capacity	95.4	92.6	94.1	92.2	94.3	92.9	-
Paperboard Production % Tonnage Capacity	94.5	93.5	91.2	93.1	91.2	92.7	-
PAPER, PAPERBOARD AND PRODUCTS			JULY	AUGUST	SEPTEMBER		
Imports....:Including Construction and :	13,110	13,101	1,096	1,105	1,004	13,208	1.2
Exports....: WMB Grades (excl. HPB) :	5,691	6,300	545	604	580	6,963	8.4
MARKET WOOD PULP PRODUCTION - Tons (000)	8,565	8,664	786	818	735	8,908	0.8
TOTAL WOOD PULP PRODUCTION - Tons (000)	61,161 f	61,998 f	5,490	5,366	5,200	63,129	1.4
WOOD PULP IMPORTS - TONS (000)	5,038	5,005	470	416	367	4,972	-1.3
WOOD PULP EXPORTS - TONS (000)	5,528	6,231	471	554	526	5,969	-8.2
RAW MATERIALS CONSUMPTION - Tons (000)							
PAPER AND BOARD MILLS....: excluding :			JULY	AUGUST	SEPTEMBER		
Wood Pulp....: consumption for :	60,294	60,727	5,366	5,178	5,034	61,631	1.4
Waste Paper....: construction & :	19,021	20,010	1,752	1,859	1,817	21,273	6.6
TOTAL....: WMB grades :	79,315	80,737	7,118	7,037	6,851	82,904	2.7
PULPWOOD CONSUMPTION Cords (000) Amer. Pulpwd. Assn	95,497	98,414	8,467	8,333	8,328	99,393	0.6
EMPLOYMENT (000)			AUGUST	SEPTEMBER	OCTOBER		
Paper and Allied Products....Total	692.6	697.1 RS	705.8	701.0	698.7	698.9	0.3
Pulp, Paper and Board Mills....Total....A	247.2	229.6 RS	232.5	229.1	227.1	229.7	0.0
AVERAGE HOURLY EARNINGS OF PRODUCTION WORKERS ($)			AUGUST	SEPTEMBER	OCTOBER		
Paper and Allied Products	11.66	11.96 RS	12.29	12.42	12.43	12.26	2.7
Pulp, Paper Mills....A	14.31	14.73 RS	15.18	15.44	15.41	15.14	3.1
Paperboard Mills....E	14.49	14.76 RS	15.17	15.42	15.61	15.16	3.3
CAPITAL EXPENDITURES, PAPER & ALLIED PRODUCTS			1989 Q4	1990 Q1	1990 Q2		
(Rept. by US Dept. of Com., Ann. Rates, Bill.$)*	10.92	15.58	17.44	17.56	18.59	17.36	11.4
INDEX OF OUTPUT PER MAN-HOUR (1977=100)			AUGUST	SEPTEMBER	OCTOBER		
:IN PULP, PAPER :...Production Workers	146.0	146.0 RS	151.4	149.7	150.3	150.3	1.2
:AND BOARD MILLS:...All Employees	142.8	144.6 RS	147.6	146.5	146.8	146.8	1.1
PAPER AND ALLIED PRODUCTS (Million $)			JULY	AUGUST	SEPTEMBER		
Industry Shipments (Dept. of Commerce)*	127,718	130,501	11,[illegible]	11,066	11,046	131,211	0.5
Pulp, Paper and Paperboard*	57,177	57,700	4,729	4,794	4,862	58,357	-3.3
Inventories (End of Period) - Total Industry*	12,065	12,571	12,842	12,747	12,755	12,755	1.3
Pulp, Paper and Paperboard*	4,325	4,980	5,182	5,200	5,212	5,212	5.9
PAPER AND ALLIED PRODUCTS COMPANIES (Million $)			1990 Q1	1990 Q2	1990 Q3		
Sales (Corporations Only)	107,221	113,573	28,534	28,844	28,862	114,987	1.6
Earnings (Corporations Only)	8,081	7,047	1,389	1,630	1,246	5,687	-27.6
Depreciation (Corporations Only)	4,625	5,010	1,347	1,341	1,360	5,424	0.7
Net Worth (Corporations Only)	42,940	45,642	46,519	45,597	46,185	46,185	-0.1
PRICE INDEXES (Bureau of Labor Stats)1982=100			AUGUST	SEPTEMBER	OCTOBER		
Pulp, Paper & Products, ex. Building Grades	124.8	132.4	132.6	132.8	132.6	133.0	0.6
Wood Pulp	136.7	157.4	151.1	152.7	150.1	153.9	-1.9
Waste Paper	183.6	157.1	133.3	136.3	130.0	140.3	-11.2
Paper	123.2	129.6	129.1	128.8	129.8	128.5	-1.0
Paperboard	133.2	140.1	134.9	135.5	133.1	136.3	-2.7
PAPER DEMAND (INDEXED: 1987=100)			AUGUST	SEPTEMBER	OCTOBER		
Total Paper Production *	103.9	103.6	108.4	105.9	106.8	106.9	3.1
Paper New Supply *	103.8	102.3	105.6	101.2	103.8	104.7	2.3
Demand Indicators - (Weighted Average) *	103.8	107.8	110.1	109.9	109.7	110.1	2.3
Production of Nondurable Goods....*....(21.2%)	103.6	106.4	108.1	107.6	107.4	107.7	1.3
Disposable Income....*....(23.9%)	104.4	107.2	109.1	109.1	108.8	108.7	1.9
Total Printing and Publishing....*....(54.9%)	103.6	108.6	111.3	111.1	111.0	111.8	3.0
PAPERBOARD DEMAND (INDEXED: 1987=100)			AUGUST	SEPTEMBER	OCTOBER		
Total Paperboard Production *	101.7	102.6	101.9	107.0	105.8	103.9	1.1
Production for Domestic Use	102.0	102.7	99.9	108.1	106.3	103.1	0.1
Demand Indicators - (Weighted Average) *	104.7	107.2	106.9	109.3	108.1	108.1	1.0
Production of Consumer Goods....*....(62.09%)	104.0	106.6	107.8	108.4	107.2	107.4	0.9
Production of Equipment....*....(5.75%)	107.5	112.3	117.1	117.6	113.8	115.3	2.8
Production of Materials....*....(32.19%)	105.8	107.4	109.6	109.7	108.8	108.2	0.7
MARKET DATA			JULY	AUGUST	SEPTEMBER		
Consumption by Publishers - Tons (000)	13,497	13,493	1,058	1,096	1,118	13,283	0.6
Newspaper Pub. and Printing Empl. Total(000)	475	473	479	479	479	477	1.2
Magazine Advertising Pages (PIB, Inc.)	172,580	180,049	10,176	11,346	16,409	184,503	-4.1
Wholesalers Sales and Inventories (Million $)			JULY	AUGUST	SEPTEMBER		
Total Paper & Pap. Prdcts. ex Wallpaper..Sales	46,564	50,740	4,493	4,738	4,307	52,204	4.2
Inventories (End of Period)	3,959	4,137	4,166	4,068	4,161	4,161	1.5
FIBRE BOX DATA (Fibre Box Association)			AUGUST	SEPTEMBER	OCTOBER		
Fibre Box Shipments (Million square feet)	308,507	313,400	28,115	25,410	30,526	323,324	1.7
Container'bd Inventory at Mill & Plant (000 Tons)	2,553	2,589	2,620	2,570	2,473	2,473	0.5
RETAIL TRADE (Billion $)							
Total Retail Sales *	1,622	1,711	150.2	152.1	152.3	1,799	5.4
Nondurable Goods Stores Sales *	995	1,062	97.2	98.3	98.1	1,148	8.7
GENERAL ECONOMIC DATA			AUGUST	SEPTEMBER	OCTOBER		
TOTAL INDUSTRIAL PRODUCTION (INDEX 1987 = 100)*	105.4	108.1	110.4	110.5	109.6	109.4	1.3
PRODUCER PRICES (ALL COMMODITIES) (INDEX 1982=100)	106.9	112.2	116.5	118.3	120.8	115.6	3.1
CONSUMER PRICES (ALL ITEMS-URBAN CON.) (1982-4=100)	118.3	124.0	131.6	132.7	133.5	130.0	5.2
GROSS NATIONAL PRODUCT - ANNUAL RATE (billion$)			1990 Q1	1990 Q2	1990 Q3		
G.N.P. or Expenditure - Current $	4,874	5,201	5,375	5,443	5,521	5,446	5.3
G.N.P. or Expenditure - 1982 $	4,017	4,118	4,151	4,155	4,173	4,160	1.1
PAPER AND PAPERBOARD CONSUMPTION - POUNDS PER CAPITA	677	667				677	

f - Wood Pulp Prod exc del., explo & scr. R - Revised RS - Revised series E - Last month estimated by API A - Estimated by API Y - Full year estimated by Dep't of Commerce * Seasonally Adjusted